

Reassign Groups - Acting and Direct Relationships

Important Information

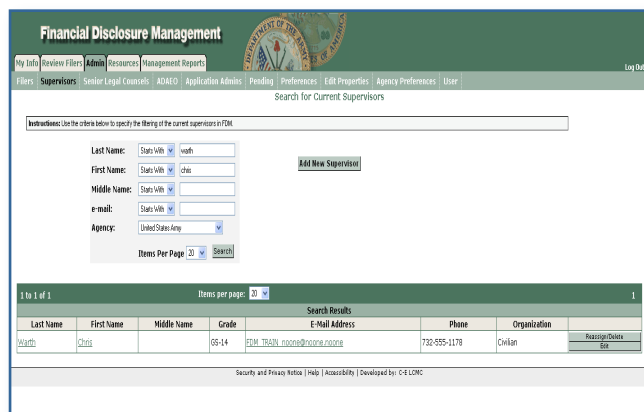
The following roles can reassign filers:

- ♦ **Reassign Supervisor:** Supervisor, Supervisor Assistant, Senior Legal Counsel, Senior Legal Counsel Assistant, ADAEO and ADAEO EC
- ♦ **Reassign Senior Legal Counsel:** ADAEO, ADAEO EC
- ♦ **Reassign ADAEO:** ADAEO, ADAEO EC

The Reassign [Role] Groups page is used to manage Filer to Reviewer group relationships for supervisors, Senior Legal Counsel and ADAEO's.

There are times when it may be necessary to move a group of filers from one reviewer to another either on a permanent or temporary basis. There are two different assigned filer groups – Direct and Acting Relationships. Users within the Direct Relationship Group have an existing relationship with the selected reviewer that was established by either the filer or the reviewer. Acting groups contain users who have a temporary relationship with the selected reviewer. This functionality works the same for all roles.

1. Click on **Admin/[Role]**. The Search for Current [Role] page is displayed.
2. Enter the search criteria, then click **Search**. A list matching the search criteria is displayed at the bottom of the page.
3. Locate the person on the list, then click on **Reassign/Delete**. The Reassign [Role] Cannot be Undone page is displayed.
4. Click **Continue**. The Specify Replacement for [Role] is displayed.
5. Enter the replacement's name, then click **Search**. The name is displayed at the bottom of the page.
6. Click on **Select** next to the person's name. The Reassign [Role] Groups Page is displayed.



Financial Disclosure Management

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Filers | Supervisors | Senior Legal Counsel | ADAEO | Application Admins | Pending | Preferences | Edit Properties | Agency Preferences | User

Search for Current Supervisors

Instructions: Use the criteria below to specify the filtering of the current supervisors in FDM.

Last Name:

First Name:

Middle Name:

E-mail:

Agency:

Items Per Page:

1 to 1 of 1 Items per page: 10

| Last Name | First Name | Middle Name | Grade | E-Mail Address | Phone | Organization | Reassign/Delete |
|-----------|------------|-------------|-------|---------------------------|--------------|--------------|--|
| Worth | Chris | | GS-14 | CDM.TBAIN.cdono@vccra.com | 720-855-1178 | Civilian | <input type="button" value="Reassign/Delete"/> |

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Reassign Group to a Direct Relationship

If a group of filers are reassigned from one reviewer to another as a direct relationship, this is considered a permanent move. When this is done, the filers who are reassigned are incorporated into the reassigned reviewer's group of filers.

7. Click on **Direct Relationships** under the column of the departing reviewer to highlight.
8. Click on the arrow to move the filers to the **Direct Relationship** column on the right side of the screen.

Reassign Group to an Acting Relationship

If a group of filers are reassigned from one reviewer to another as an acting relationship, this is considered a temporary move. When this is done, the filers who are reassigned are not incorporated into the reassigned reviewer's group of filers, but are listed as a separate group.

9. Click on **Direct Relationships** under the column of the departing reviewer to highlight.
10. Click on the arrow to move the filers to the **Acting Relationship** column on the right side of the screen.
11. Click **Continue**. The Reassign/Delete [Role] Change Summary page is displayed confirming the change has been made. There is also a prompt on the page to remove the role of the person who is leaving. Again, if the leave is permanent, select **Yes**; if the leave is temporary, select **No**.
12. Click **Finish**. A message displays confirming that you wish to continue with the Reassign/Delete action.
13. Click **OK**. You return to the Search for Current [Role] page.

Reassign Group Back to the Original Reviewer

To reassign a filer's group back to the original reviewer, follow the above steps and first search for the reassigned reviewer's name, then search for the original reviewer's name. When you get to the Reassign Groups page, the acting group is displayed separately on the list of the reviewer.

The screenshot shows the 'Reassign Supervisor Groups' page. At the top, there's a header with 'Financial Disclosure Management' and a search bar containing 'Select filer(s) to be reassigned to original reviewer group and assign'. Below the search bar, there are two columns. The left column is titled 'Supervisor Groups to be reassigned from Supervisor Training ID:' and contains a list of items with checkboxes. The right column is titled 'Groups to be reassigned to filer(s):' and also contains a list of items with checkboxes. At the bottom of the page, there are 'Cancel' and 'Continue' buttons.

1. Highlight the acting group's name.
2. Click on the forward arrow to place the acting group into the **Direct Relationship** section under the original reviewer.
3. Click **Continue**. The Reassign/Delete Change Summary screen displays confirming that the filer's have been reassigned.
4. Click **Finish**. Another message displays confirming that you wish to continue.
5. Click **OK**. You return to the Search for Current [Role]page.

IMPORTANT INFORMATION

A reviewer who has acquired another reviewer's filers through this process, whether it be direct or acting, can eSign the reassigned filer's reports.